



**North Carolina Department of Health and Human Services
Division of Aging and Adult Services**

2101 Mail Service Center • Raleigh, North Carolina 27699-2101

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Michael F. Easley, Governor
Dempsey Benton, Secretary

Dennis W. Streets, Director
919-733-3983

January 3, 2008

**DEAR COUNTY DIRECTOR OF SOCIAL SERVICES
DEAR LOCAL MANAGEMENT ENTITY DIRECTOR**

**ATTENTION: Adult Services Supervisors
Social Services Security Officers
Local Management Entity Security Officers**

SUBJECT: 2007 End-of-Year DHHS Blanket Bond Reconciliation

The Adult Services Section of the Division of Aging and Adult Services (DAAS) is responsible for management of the Department of Health and Human Services (DHHS) Blanket Bond for Disinterested Public Agent Guardians. As part of this responsibility, we are preparing for the 2007 annual accounting with the insurance carrier. This accounting requires that accurate information be submitted to the insurance carrier regarding the names of all wards represented by public agent guardians and the amount of each ward's bond. It is important that our records be kept up-to-date to maintain valid coverage for each ward registered in the DHHS Blanket Bond system. In addition, the amount of the premium paid by DHHS for the total bond is based on the aggregate amount of bond for each ward. You are responsible for notifying DAAS of any changes in the status of each ward throughout the year.

Instructions for Obtaining "Wards by Agency Report"

With the assistance of your security officer, you can procure your "*Wards by Agency Report*" directly from the DHHS Client Services Data Warehouse (CSDW).

Services staff should meet with the agency security officer to establish a collaborative plan for accessing the report. All social services and local management entity security officers already have access to the CSDW, which is found at <https://www.csdw.dhhs.state.nc.us/>. **Please note that this website address takes you to "Client Services Data Warehouse Query Tool Using Business Objects XI R2", which is CSDW's new website. The following directions on how to access your agency's report from this new website differ from the directions you have used in the past.**

The "*Wards by Agency Report*" may be obtained by doing the following:

1. Click on "+" beside "*Public Folders*" on the left side of the screen.

2. Click on “+” beside “*DHHS Main Document*” on the left side of the screen.
3. Click on “+” beside “*DAAS*” on the left side of the screen.
4. Click on the folder beside “*Guardianship*” on the left side of the screen.
5. Click on “*Active – Wards By Agency Report.*”
6. You must respond to the following prompts:
 - “*Agency Type Equal to:*” – Highlight this prompt, then go to the lower right “*Agency Type Equal to*” text box. One by one, delete each unwanted agency type by highlighting it and clicking on the “*Remove Selected Value(s)*” button. This is the bottom double-arrow button to the left of the text box. When you have removed all unwanted agency types, only your agency type will appear in the highlighted “*Agency Type Equal to:*” prompt.
 - “*Report Month Equal to:*” – Highlight this prompt. Click on the “*Refresh Values*” button. Scroll down to the most recent date in the text box (should be 200712) and highlight it. Click on the “*Add From List of Values*” button. This is the top double-arrow button to the right of the text box. The report month you selected will then appear in the “*Report Month Equal to:*” prompt.
7. When you have the appropriate entries in the prompts, click on “*Run Query*” and your “*Wards by Agency Report*” will appear.
8. Print out a copy of the report.

Security officers who need additional assistance with the new CSDW system can contact csdwsupport@ncmail.net, or call (919) 855-3200 and choose Option 2.

Making Changes and Updates to Your List of Wards

When you obtain your printed copy of the “*Wards by Agency Report*”, please review the entries for accuracy, with particular attention paid to the following:

- Wards you are no longer responsible for and whose names should be deleted from your list.
- Wards you are responsible for but whose names are not on the list.
- Wards’ dates of birth.
- The amount of estate and bond coverage listed for each ward.
- The name and position of the public agent guardian.

Please note that North Carolina General Statute 35A-1239 requires bond coverage for all disinterested public agents appointed to serve as guardians, whether they are appointed to serve as guardians of the person, estate or general guardians.

If you need to make changes and/or updates to your DHHS Blanket Bond list, you must still submit them in hard copy, using a DHHS-7016 (rev. 1/04) form. A copy of the form may be obtained at <http://info.dhhs.state.nc.us/olm/manuals/doa/gs/man/dhhs7016.pdf>.

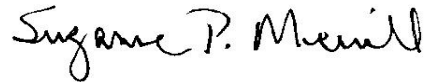
All DHHS-7016 forms containing necessary changes and/or updates to your list of wards should be mailed to:

Kate Walton, Guardianship Program Consultant
Division of Aging and Adult Services
Adult Services Section
2101 Mail Service Center
Raleigh, NC 27699-2101

PLEASE SUBMIT ALL CHANGES AND/OR UPDATES BY February 4, 2008.

If you have questions or need additional information, please contact Ms. Walton at (919) 733-3818. County departments of social services may contact their Adult Programs Representatives.

Sincerely,

A handwritten signature in black ink that reads "Suzanne P. Merrill". The signature is written in a cursive, flowing style.

Suzanne P. Merrill, Chief
Adult Services Section

SM/ksw

AFS-01-2008